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Foreign Crops and MARKETS



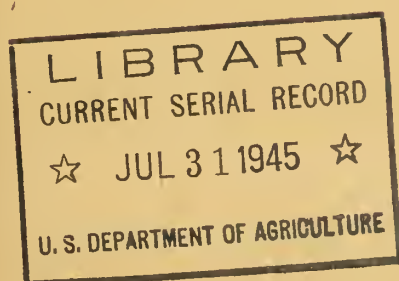
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L A T E C A B L E S

The Belgian Congo's cotton crop for 1944-45 is placed at 170,000 bales (478 lbs.), compared with 184,000 bales in 1943-44 and 235,000 bales in 1942-43. The decline is attributed to reduced acreage resulting from shifts in labor to work on rubber plantations and in mining enterprises. The Belgian Congo has two cotton crops annually. The estimate for the last December-March crop is 95,000 bales from 419,000 acres. The current estimate for the June-September crop is 75,000 bales from 445,000 acres.

Canada's Prairie Provinces received scattered rains during the second week of July. Temperatures ranged from moderate to hot. Widespread drought was reported through the southwestern half of Saskatchewan and central and southeastern Alberta, and poor yields were said to be certain in these latter areas. Prospects were good, however, in the whole of Manitoba, the northwestern half of Saskatchewan, southwestern Alberta, and the Peace River area. Moderate hail damage was reported in Alberta. Weeds were still a serious menace but insect damage was light.

Norwegian dairies report milk receipts for 1944 at only 42 percent of the 1939 deliveries. During the first 5 months of 1945, production declined 27 percent, compared with the corresponding period in 1944. The chief factors limiting dairy production are a 12 to 15 percent decline in number of cows and a shortage of protein feed concentrates. While the outlook for increased production during the remainder of 1945 is good, Norwegian dairies are not likely to attain the 1939 level of production until the last half of 1947, assuming that pasturage conditions are favorable. The dairy industry now is dependent on a high production of fisheries for most of its requirements of protein feeds. No dairy products are likely to be available for export for the next 2 years.

Danish milk, butter, and egg production during the first half of 1945 compared with production during the first half of 1944, the latter shown in parenthesis, was reported as follows: milk, 4,010,000,000 (3,904,000,000) pounds; butter, 132,276,000 (136,685,000) pounds; and eggs, 62,611,000 (57,761,000) pounds. Bacon production during the first third (January-April) of 1945 was placed at 62,610,000 pounds, compared with 57,761,000 pounds in the corresponding 4 months of 1944.

The acreage under principal crops in England and Wales, based on farmers' forecasts in the spring, were estimated as follows, the acreage for 1944 being shown in parenthesis: wheat, 2,250,000 (3,063,000); barley, 1,920,000 (1,721,000); oats, 2,310,000 (2,226,000); mixed grain, 500,000 (410,000); potatoes, 960,000 (980,000); turnips, swedes, and mangolds, 775,000 (771,000); and sugar beets, just over 400,000 (418,000). Weather during June was unsettled and, apart from a short warm spell, cool for that time of the year.

WORLD'S 1945-46 TOBACCO CROP TO BE SMALLER

World production of leaf tobacco during the July 1945 to June 1946 period is estimated at 6,346 million pounds, or about 2.4 percent smaller than average world production of 6,505 million pounds, during the 5 years 1935-1939. Decreases in production substantially below the prewar level, forecast for crops in Europe and Asia, including Japanese-held areas, probably will more than offset indicated production increases in most countries of the Western Hemisphere. Consumption of tobacco is at record levels in many countries, and stocks have declined. The heavy demand for leaf and favorable prices have continued, and acreage has been increased where labor and materials were available.

In preparing the estimates, account has been taken of production trends in recent years in countries not physically affected by the war, of the probable effects of the war on agriculture in liberated countries of Europe, and of the stimulus to production provided by heavy demand for leaf tobacco at prices favorable to growers. For some countries reliable information is available on prospective plantings; in other cases, although data are inadequate, there are indications as to probable acreages. While data are insufficient to make individual country estimates in Japanese-held areas, allowances for these areas have been included in the total.

NORTH AMERICA: The United States 1945 tobacco crop, according to the first official estimate, is placed at 1,890 million pounds, or 3 percent smaller than last year's record crop of 1,950 million pounds, but 26 percent above the 5-year (1940-1944) average of 1,498 million pounds. The 1945 crop of flue-cured leaf is estimated at 1,091 million pounds, and production of Burley, the other principal cigarette type, is given at 552 million, second only to the 1944 record crop of about 592 million pounds.

In Canada, restrictions on flue-cured plantings have been removed, and goals for 1945 call for a total acreage for all types of leaf about 22 percent above the 89,000 acres planted in 1944. Smaller stocks, increased domestic consumption, and export demand have prompted the larger 1945 acreages. Based on the proposed 1945 acreage of about 109,000 acres, and with average weather conditions, Canada's tobacco production this year should total about 120 million pounds, or 14 percent larger than the 1944 crop, and about 43 percent larger than the average production during 1940-1944 of 84 million pounds.

In Cuba, the 1945-46 production of tobacco is forecast at slightly less than 60 million pounds. No data have been received regarding the outturn during 1944-45, but indications are that it was somewhat below the large 1943-44 production of 66 million pounds. Tobacco production in Cuba averaged 51 million pounds from 100,000 acres during the 5 years 1939-40 through 1943-44.

Prices offered for the large Puerto Rican 1944-45 crop are reported to be considerably below those paid for the previous crop, and lower plantings in 1945-46 probably will result. The probable production in 1945-46 is obscured by several factors, but may be about 32 million pounds, or 20 percent lower than the 1944-45 crop, but approximately 12 percent larger than the average production of 26 million pounds during the 5 years 1939-40 through 1943-44. In the Dominican Republic and Mexico, the 1945-46 tobacco crops probably will approximate the average production of recent years. Prices for leaf in the Dominican Republic have risen considerably in recent months, and most of the stocks of old-crop leaf have been sold for export. A 1945-46 crop of 18 million pounds would provide an export surplus of about 12 million pounds. Foreign demand for Mexican leaf tobacco is insignificant, and has no bearing on production in that country. The large 1944-45 crop of about 60 million pounds has replenished the country's tobacco stocks, and an acreage reduction during 1945-46 is probable.

Total tobacco production in North America during the 1945-46 season is forecast at 2,159 million pounds, or about 26 percent above the 1940-1944 average, and about 30 percent above the prewar (1935-1939) average.

EUROPE: Little information is available regarding the 1945 tobacco plantings in some European countries. With few exceptions, the 1945 harvests probably will run from 20 to 40 percent below the prewar average production. In Switzerland, Belgium, Rumania, and Spain, the 1945 crops may be larger than prewar, but in such countries as France, Germany, Poland, Hungary, Czechoslovakia, and Italy, emphasis will be placed on food production. In Bulgaria, Greece, and Yugoslavia, total production will be below the prewar level. Latest information indicates that 1945 production in Greece will be about one-half the prewar average crop of 133 million pounds. Total European production in 1945-46 for specified countries exclusive of the Soviet Union, is forecast at about 550 million pounds, compared with average production of 656 million pounds during 1935-1939 for the same countries.

ASIA: There is no information available on production in several of the important tobacco-producing countries in Asia still under Japanese occupation. There are, therefore, no individual country estimates for 1945-46 included in the table for the Netherlands Indies, Thailand, and Indo-China, and no individual forecasts are shown for production in Japan and its possessions, Korea (Chosen) and Taiwan. During the period 1935-1939, the countries of the Empire and the lands now occupied by the Japanese, exclusive of the area held by them in China, produced an average of 487 million pounds of leaf tobacco. In arriving at a world total, a figure of 400 million pounds has been taken for these areas in 1945-46.

In Free China, the 1945-46 production, based on latest information, is placed at about 920 million pounds; in India at 1,050 million pounds; or somewhat lower than the prewar average of 1,094 million pounds; Burma production is expected to be substantially below prewar average, and in the Philippine Islands production substantially below the 1935-1939 average of 72 million pounds is anticipated. Recent heavy fighting in Northern Luzon, the Islands' most important tobacco-producing area, and the lack of

necessary equipment, may reduce plantings considerably below the prewar level. The 1945-46 outturn may be down to 50 million pounds, or about 30 percent below the 1935-1939 average.

Turkey's 1945 tobacco crop will again compete with other Oriental tobaccos for the world's markets, particularly with leaf produced in Greece which has considerable stocks available for export. Consequently, 1945 acreage in Turkey probably will be smaller than in 1944 and production less than the 1944 crop of 125 million pounds. Information as to prospective planting in other Near Eastern countries, Palestine, Iran, and Iraq, is scanty, but production in these countries during 1945-46 is not expected to vary greatly from the averages of recent years. In view of political unrest in Syria and Lebanon, plantings may show a reduction from those of recent years.

SOUTH AMERICA: The outlook is extremely favorable for larger tobacco production during 1945-46 in most South American countries. Brazil, the most important producing country in the Continent, should have a near-record harvest of about 220 million pounds. Heavy demands for leaf for export and domestic consumption have pushed prices to levels much above those of early war years, and stocks on hand have declined. Recent information indicates that tobacco growers in Bahia, the principal dark tobacco-producing State, and in Rio Grande do Sul, which produces about 90 percent of the country's flue-cured leaf, are planning increased acreages for 1945-46. The prospective reopening of European markets, which in pre-war years imported substantial quantities of leaf from Colombia, and increasing domestic requirements, have encouraged growers in that country to plan larger acreages for 1945-46. In Paraguay, however, prospective plantings for 1945-46 probably will be below the 1935-1939 average of 22,000 acres, and production should be smaller. In Argentina, Chile, and Uruguay, production may be slightly larger than in recent years.

AFRICA: In the tobacco-producing countries of Africa, excepting Algeria, the 1945-46 tobacco crops are expected to be somewhat larger than the average harvests during the 1940-1944 period and considerably above the 1935-1939 averages. Southern Rhodesia, the most important exporter of flue-cured leaf among the countries of the British Empire, probably will have a flue-cured crop of about 45 million pounds in 1945-46, and total leaf production may reach 50 million pounds. In the Union of South Africa and Nyasaland, the output should be somewhat larger than in recent years. Algeria, formerly an important exporter of leaf tobacco, will produce an extremely small tobacco crop in 1945, due to emphasis on food crops. The outturn is not expected to exceed 15 million pounds, compared with the 5-year (1935-1939) average of about 40 million pounds.

OCEANIA: In Australia and New Zealand, the 1945-46 tobacco crops may show increases over 1944-45 production of about 3.3 million pounds and 4.0 million pounds respectively.

This is one of a series of regularly scheduled reports on world agricultural prospects prepared by the OFAR Committee on Foreign Crop and Livestock Statistics. It was prepared by Joseph A. Becker, Chairman, C. M. Purves, Allen H. Lester, Hugh W. Taylor, Franklin S. Everts, and Montell Ogdon.

TOBACCO: ACREAGE HARVESTED, YIELD PER ACRE, AND PRODUCTION IN SPECIFIED COUNTRIES,

AVERAGES 1930-34, 1935-39, 1940-44, AND ESTIMATES FOR 1945-46

CONTINENT AND COUNTRY	AVERAGE ACREAGE HARVESTED				AVERAGE YIELD PER ACRE				AVERAGE PRODUCTION				ESTIMATE 1945-46			
	1930-34		1935-39		1940-44		1930-34		1935-39		1940-44		ACRES		YIELD	
	1,000 ACRES	1,000 ACRES	1,000 ACRES	1,000 ACRES	POUNDS	POUNDS	POUNDS	POUNDS	POUNDS	POUNDS	POUNDS	POUNDS	PER ACRE	POUNDS	PRODUCTION	
NORTH AMERICA:																
UNITED STATES	1,706	1,647	1,460	1,460	784	887	1,026	1,337,538	1,460,054	1,497,851	1,822	1,037	1,890,000			
CANADA	48	69	75	75	947	1,103	1,111	45,150	76,556	83,822	109	1,100	120,000			
MEXICO	33	46	46	46	722	828	867	24,112	38,132	40,822	48	850	40,800			
CUBA	3/ 127	112	100	100	3/ 394	431	515	50,064	48,101	51,483	130	450	58,500			
DOMINICAN REPUBLIC	—	—	—	—	—	—	—	—	—	—	—	—	—			
PUERTO RICO	35	43	36	36	675	662	711	23,517	28,276	18,700	12	1,500	18,000			
TOTAL ABOVE	1,949	1 917	1,717	1,717	—	—	—	1,497,838	1,664,779	1,718,254	2,161	800	32,000			
EUROPE:																
SWEDEN	1	1	1	1	1,736	1,735	1,661	1,186	1,061	1,115	1	1,500	1,100			
BELGIUM	7	6	—	—	2,100	2,033	—	14,777	13,040	—	14	1,800	25,200			
GERMANY	27	33	36	36	2,231	2,254	3/2,578	60,304	74,355	92,208	27	2,200	59,400			
POLAND	12	17	—	—	1,334	1,664	—	16,123	28,566	—	12	1,400	16,800			
FRANCE	41	45	36	36	1,720	1,681	3/1,279	71,259	76,011	45,452	42	1,350	56,700			
SWITZERLAND	1	1	2	2	1,672	1,571	3/1,859	1,936	2,276	3,424	2	1,800	4,200			
CZECHOSLOVAKIA	23	19	4	4	1,268	1,238	3/1,246	29,268	31,143	—	16	1,100	17,600			
HUNGARY	53	37	39	39	1,259	1,238	3/1,246	67,145	45,872	48,048	34	1,200	40,800			
ROMANIA	40	44	56	56	603	647	3/580	24,082	28,697	32,187	90	550	49,500			
SPAIN	10	8	33	33	1,551	1,200	—	15,964	9,600	—	33	1,200	39,600			
ITALY	97	81	105	105	1,097	3/1,184	3/1,023	106,218	95,585	107,254	79	1,000	79,000			
ALBANIA	3	5	—	—	848	826	—	2,473	4,082	—	4	800	3,200			
YUGOSLAVIA	35	39	—	—	768	969	—	26,976	37,410	—	35	800	28,000			
BULGARIA	67	94	179	179	793	809	3/ 740	53,527	75,851	132,455	85	750	63,800			
GREECE	195	226	—	—	530	589	—	103,615	132,819	38,049	130	500	65,000			
TOTAL ABOVE	612	656	—	—	—	—	—	594,853	656,368	—	604	—	549,900			

ASIA:	124	194	683	661	84,740	128,505	133,728	169	109,900
TURKEY	14	13	534	699	1,708	8,825	10,676	11	7,200
SYRIA AND LEBANON	4	7	420	401	1,528	2,760	2,361	7	3,000
PALESTINE		5							
IRAN	29	32	230	1,096	35,384	31,542	21,583	25	20,000
IRAQ	14	11	1,054	752	9,658	9,999	9,693	19	12,500
CHINA	944	1,288	1,028	1,021	970,474	1,251,539	944,785	970	913,600
INDIA	1,187	1,265	1,006	865	1,071,616	1,094,013		1,235	1,050,000
BURMA	98	108	903	990	97,216	107,072		78	70,200
THAILAND (SIAM)	27	27	607	843	16,643	21,997			
FRENCH INDOCHINA	36	44	774	728	27,817	32,004			
JAPAN	86	92	1,666	1,621	143,680	148,680			
KOREA (CHOSEN)	35	46	1,052	1,252	36,778	57,304	70,955		50,000
TAIWAN	2	4	1,818	1,498	3,507	5,961			
PHILIPPINE ISLANDS	179	171	515	1,423	92,249	72,274		125	
JAVA AND MADURA									
ESTATE	73	67	799	730	58,362	48,655			
NATIVE	376	353	402	402	150,513	141,883			
SUMATRA ESTATE	39	31	863	970	34,004	30,131	19,672		
TOTAL ABOVE	3,267	3,753			2,842,877	3,199,144			
SOUTH AMERICA:									
BRAZIL	264	243	816	835	215,810	203,266	203,440	259	220,200
COLOMBIA	20	37	1,090	877	18,673	25,985		39	35,100
CHILE	7	9	1,742	1,808	11,587	16,619	12,504	7	12,600
ARGENTINA	37	36	861	893	32,080	31,906	38,898	48	43,200
PARAGUAY	23	22	338	801	30,999	17,792		18	13,500
URUGUAY	2	2	861	660	1,354	1,254	1,081	2	1,500
TOTAL ABOVE	353	349			310,503	296,822		373	325,900
AFRICA:									
ALGERIA	54	57	742	710	40,394	40,462	25,980	25	15,000
TUNISIA	1	1	1,041	1,196	1,296	1,202	1,305	2	1,800
NYASALAND	42	57	343	286	14,354	16,311	21,700	80	24,000
NORTHERN RHODESIA	3	4	510	426	1,410	1,635		4	1,800
SOUTHERN RHODESIA	32	51	536	597	17,236	26,061	40,600	90	49,500
UNION OF SOUTH AFRICA	28	47	540	485	15,473	21,719	21,750	52	26,000
MADAGASCAR	29	41	647	693	19,068	14,685		23	15,000
MOZAMBIQUE	3	1	691	305	1,088	417	645	2	700
TOTAL ABOVE	192	252			110,319	122,492		278	133,800
OCEANIA:									
AUSTRALIA	14	10	442	532	6,087	5,276	5,208	750	4,500
NEW ZEALAND	2	2	777	822	1,234	1,645	3,235	1,250	
TOTAL ABOVE	16	12			7,321	6,921	8,443	10	2,000
TOTAL COUNTRIES SPECIFIED	6,389	6,946			5,363,111	5,946,526		6,715	5,820,800
TOTAL OTHER COUNTRIES	491	531			341,931	558,150		575	525,000
WORLD TOTAL	6,880	7,477			5,705,042	6,504,676		7,290	6,345,800

1/CALCULATED FROM ACTUAL DATA. NOT ROUNDED FIGURES. 2/ESTIMATES FOR CROPS TO BE PRODUCED WITHIN PREWAR BOUNDARIES. 3/LESS THAN A 5-YEAR AVERAGE.

4/EXPORTS. 5/FREE CHINA. 5/BRITISH INDIA AND REPORTING NATIVE STATES. 7/APPROXIMATIONS FOR COUNTRIES FOR WHICH INFORMATION IS INADEQUATE FOR PREPARATION OF INDIVIDUAL COUNTRY ESTIMATES.

NOTE: DATE FOR 1940-44 FOR GERMANY, FRANCE, CZECHOSLOVAKIA, HUNGARY, BELGIUM, AND GREECE, ARE NOT NECESSARILY COMPARABLE WITH 1930-34, 1935-39, AND 1945-46 DATA, BECAUSE OF TEMPORARY BOUNDARY CHANGES.
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COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

EGYPT'S GRAIN HARVEST
BELOW AVERAGE

The 1945 Egyptian wheat crop was forecast by provincial officials at about 42,439,000 bushels, compared with 34,761,000 bushels for 1944, and an average of 46,822,000 bushels for the 5 years 1939-1943. Officials believe, however, that the wheat requisitioning program has resulted in general underestimation, and that the current crop may exceed 44 million bushels. The barley crop is expected to be around 11 million bushels, or slightly larger than last year's crop, though less than the previous 5-year average.

Grain acreage has increased during the war years primarily as a result of Government regulation of the percentage of land planted to various crops. In the case of barley, a current acreage increase also reflects a shift from flax to barley, due to a higher price incentive for the latter. Yields of all grains, on the other hand, have declined during the war, as a result of extreme shortages of nitrogen fertilizers and cultivation controls, which have prevented normal crop rotation.

Wheat stocks in metropolitan areas were expected to be reduced to a minimum before sufficient quantities of the new crop became available, as a result of delays in transportation and the lateness of the season. An increase in the wheat content of flour is proposed, admixing 20 percent of barley for July-September, instead of the present content of 68 percent wheat and 32 percent of grain sorghum or corn. The goal for requisitions from the 1945 crop was set at 27.6 million bushels for wheat, compared with 19.7 million bushels in 1944, and 2.2 million bushels for barley. The new crop price schedule shows no change from last year's quotation of the equivalent of \$3.00 per bushel for Hindi wheat and \$2.85 per bushel for Baladi, but other grains are slightly lower.

GREECE REPORTS REDUCED
GRAIN CROP

The 1945 grain crop in Greece is estimated at only about 60 percent of the prewar average, although larger than last year's small production. The present estimate places the crop at a substantially lower level than early-season forecasts. The deterioration in prospects was due to prolonged drought in Greece. Normal late spring rainfall was missing in most of Macedonia, Thessaly and Thrace, according to reports. Almost complete crop failure was reported in mountain regions and on the islands.

Decreased acreage was also an important factor in the reduction from normal outturns. The largest quantitative reduction is reported for the wheat acreage, which was considerably smaller than average. A significant reduction was also noted for barley, and smaller decreases in corn, rye, and oats.

Current yields of grain are, on the basis of present returns, only about 65 to 80 percent of average, with best yields indicated for wheat and poorest for oats and barley. Factors listed as reducing yields include lack of fertilizer and shortage of draft power, in addition to the drought damage.

CUBAN RICE STOCKS DECLINE

Despite larger Cuban rice imports in the first 11 months of the August-July marketing year than in the corresponding period a year ago, wholesalers' stocks of rice now are smaller than at any time during the war. Retail stocks, built up to an exceptionally high level in earlier months, also are being rapidly depleted, and rice shortages probably will be general in all commercial channels by the end of July. Wholesalers' rice stocks may be far less than the amount considered necessary to prevent a critical situation in Cuba's main foodstuff before the United States new rice crop is available for importation in September.

The rains, which broke the prolonged Cuban drought in late June, were too late to assure normal yields, and, therefore, rice production will not be as large as many growers planned. The total seeded acreage apparently was about the same as last year, but there appears little chance for a crop of more than 45 million pounds of milled rice, compared with 50 million last year and the record crop of 65 million in 1943.

CUBA: Rice imports, August-June 1944-45,
with comparisons

Country of origin	August-July		August-June		
	1941-42	1943-44	1941-42	1943-44	1944-45
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	351	307	349	265	320
Ecuador	22	86	19	86	70
Chile	8	28	5	24	6
Mexico	22	0	22	0	0
Other countries	16	1	16	1	0
Total	419	422	411	376	396

Compiled from preliminary figures of ships' manifests, American Embassy, Habana.

VEGETABLE OILS AND OILSEEDSARGENTINA TUNG
INDUSTRY EXPANDING

Argentina tung tree plantings have increased from 492,650 trees in 1937 to 10,354,651 in 1944, according to a recent official publication. In terms of acreage this means that Argentina may have almost 160,000 acres under cultivation. The most marked expansion of the industry has occurred in the war years since 1941 when over 87 percent of the total plantings (40 percent in 1944) have been set out. When the total 160,000 acres of tung trees reach bearing age, and assuming a yield of 1 ton of nuts per acre, Argentina may have a potential tung oil production of about 25,000 short tons. If further plantings are made, the future output may be still larger.

Due to recent expansion in acreage, the 1945 dried tung nut harvest is estimated at about 16,500 short tons, or the equivalent of 2,300 short tons of oil. Domestic consumption of tung oil, also increasing, is now around 400 to 500 tons, with an indicated exportable surplus of at least 1,500 tons this year. Accurate data on past production estimates are not available, but the current output is expected to be the largest on record. Tung growing, a relatively new industry in Argentina, is confined to the extreme northeastern part of the country, with about 97 percent of plantings in the Territory of Misiones and the remainder in the Province of Corrientes.

In 1942 there were 3 mills pressing tung oil in Argentina, one of these were located in the producing region and the third at Corrientes, some 250 miles down the Parana River from Misiones. With greater output, new mills have probably been constructed or the original ones enlarged.

Argentina tung oil producers realize that future success of the industry depends on their ability to market their commodity at world prices. Current wholesale prices are high, ranging from 28 to 32 cents a pound in Buenos Aires. In 1942 prices were considerably higher as a result of a short crop. Many of the growers, however, believe, that even with lower returns than have prevailed to date, the tung oil industry will be a profitable enterprise.

PEANUT AREA IN
FRENCH WEST AFRICA INCREASED

French West African producers are expected to reach their goal of 550,000 short tons of unshelled peanuts for the first time since 1941 providing normal weather prevails during the season. Approximately 65,000 tons of seed have been supplied for the 1945 crop. This is by far the largest quantity distributed to growers since the cultivation of peanuts, on a commercial scale, was introduced into French West Africa. The seed was reported to be of excellent quality.

Rains in Senegal, the most important peanut producing Colony, supplied sufficient moisture to permit planting to begin early in July. Harvesting takes place after the dry season begins, usually in October and November. The peak marketing and exporting months are from December to May.

Peanut production is estimated from the volume marketed, which in turn depends upon the quantity and price of other foods available to growers. Imported foodstuffs have been substantially reduced during the war, and when locally produced crops are scarce and high in price, the natives consume larger quantities of peanuts. Despite the fact that peanuts distributed for planting averaged about the same tonnage between 1935 and 1944, the quantity marketed dropped from 550,000 tons in 1935-36 to 250,000 in 1944-45. Exports have been greatly reduced during the past 3 years due to short crops and increased consumption. Prewar (1934-1938) shipments averaged about 520,000 tons with approximately 98 percent to France and other possessions.

FRUITS, VEGETABLES, AND NUTS

CUBAN VEGETABLE SEASON UNSATISFACTORY

The Cuban vegetable shipping season ending in April, with the exception of small shipments of miscellaneous items, was very unsatisfactory totaling only 13 million pounds, or about half as large as the preceding season, and only one-sixth as large as the 3-year average, 1938-39 to 1940-41. The October hurricane, which ruined many early plantings, together with the drought and shortages of shipping and materials, resulted in a small export crop. Tomatoes made up the bulk of the shipments, and amounted to around 12 million pounds, compared with 21 million for the preceding season.

FRESH VEGETABLES: Shipments from Habana to the United States,
November-June, 1943-44 to 1944-45.

Kind	Season beginning November			
	Average 1938-39			
	to 1940-41	1943-44	1944-45	
	1,000 pounds	1,000 pounds	1,000 pounds	
Tomatoes	58,695	20,548	1,786	
Eggplant	6,369	283	149	
Peppers	5,540	49	24	
Okra	1,852	293	166	
Lima beans.....	5,347	0	0	
Cucumbers	2,659	771	550	
Potatoes	1,860	0	0	
Others	1,591	1,301	422	
Total	83,913	23,245	13,097	

From official sources.

SUGARPHILIPPINE SUGAR ESTIMATE
SHOWS SHARP DROP

The sugar production in the Philippines in the 1945-46 campaign is tentatively estimated at not more than 25,000 short tons, compared with a prewar output of 1,127,000 short tons. This sharp reduction in output, compared with the prewar level, is due to the fact that cane acreage has been destroyed or abandoned during the period of Japanese occupation. Somewhat more sugar could be produced in 1945-46 than is now indicated, however, if the diversion of sugar cane to the production of alcoholic beverages could be controlled and if no cane were used for planting for next year's crop.

For 1946-47 the prospect is that 350,000 tons of sugar could be produced in the Islands, provided that sufficient cane can be salvaged for planting purposes this fall, and that some equipment, machinery, fertilizer, and financing is supplied. Then, with favorable conditions a full prewar crop could be produced in 1947-48.

During the period of Japanese occupation, 6 mills on Luzon and Negros Islands were virtually destroyed, 10 were badly damaged and 11 were slightly damaged. The important mills listed as slightly damaged, it is reported, can be repaired in a short time with little more than normal replacements. Most of the cane railways also have suffered serious losses of rails, ties, and rolling stock.

SUGAR CANE ACREAGE
IN REUNION INCREASED

The 1944 sugar cane acreage in Reunion totaled about 40,000 acres, or 60 percent larger than the relatively small acreage in sugar cane in 1943, but about one-third less than in 1940. Because of hurricane damage to crops, however, the production of sugar is not likely to be increased materially.

Prior to the war sugar cane production was the main crop of the Island, but owing to the disruptions of maritime transportation with Indo-China, the chief source of rice for Reunion, it became necessary to increase food production and to decrease sugar production for export. In 1940 Reunion had about 100,000 acres of crop land, of which about 60,000 acres were in sugar cane, 20,000 acres in food crops, 17,000 acres in geranium, and 3,000 acres in miscellaneous crops. As food shortages developed and sugar stocks increased, the Governor of the Island decreed that as much as 50 percent of the sugar cane acreage should be planted to foodstuffs. This action resulted in the reduction of the sugar cane acreage in successive steps from 60,000 acres in 1940 to 25,000 acres in 1943. As a consequence, the production of sugar has declined from 124,000 to 28,000 short tons in the same period. Although the acreage was increased in 1944, severe hurricane damage to standing cane caused production to drop still more to 17,000 short tons.

LIVESTOCK AND ANIMAL PRODUCTSUNITED KINGDOM RELAXES
CURBS ON WOOL INDUSTRY

Britain's first step in partially easing wartime control on the wool industry was taken recently when wool merchants were granted permission, in the new raw materials rationing period beginning July 1, to buy raw materials for resale to the industry while topmakers were allowed to sell tops on their own account.

During the initial stages, however, merchants and topmakers will be permitted to buy raw material on their own account up to a maximum of 50 percent of the industry's total requirements for the rationing period July-October 1945, with each firm being allowed a proportionate share. The Wool Control will handle the remaining 50 percent by direct sales to manufacturers and by passing on of wool to topmakers for combing on commission.

No selling prices of wool tops and nolls sold through merchants and topmakers have been fixed, but the fact that the 50 percent of supplies remain under the Wool Control, to be sold at officially published issue prices, is expected to act as a ceiling during the period that the buyer has the alternative of going to the Control for his supplies.

Issue prices Nos. 13 and 14 for raw material sold by the Control to British manufacturers and topmakers for the home trade, fixed as of November 1, 1940, will continue until October 31, 1945. Issue prices Nos. 21 and 22, fixed on October 2, 1944, for wool, tops and nolls sold to manufacturers for production of yarns and fabrics for export are still in effect. These prices are 5 to 11 percent higher, according to grade, than when sold to operators producing goods for the domestic market. Raw materials being released for export in their existing state are released at prices 1/39th higher than issue prices Nos. 21 and 22. Thus, the ceiling price of 64's warp (combing wool) colonial wool sold to manufacturers producing goods for the domestic market is set at 59.7 cents a pound and to those producing for export at 65.6 cents, or 10 percent higher, and at 67.3 cents a pound if exported in its raw condition. (See issue of October 30, 1944, for details.)

The limitation of private trading to 50 percent is reported to have been imposed to give firms which have been out of business for several years and have invested capital elsewhere an opportunity to re-enter business gradually. All wool imports are still handled by the Control and private firms are not allowed to make direct imports. Since September 1939, the Wool Control has had complete authority over the British wool industry.

The 1945 domestic wool clip was again purchased by the Minister of Supply under powers conferred by the Control of Wool Order (No. 22) 1945, and at the same prices prevailing for the last 3 years. Prices, on a greasy basis, range from 33.2 cents a pound for finer wools (medium grades from Dorsets, Downs and Horns) to 26.1 for Irish Blackfaced carpet wools. (See issue of June 26, 1944.)

COTTON AND OTHER FIBRES

COTTON: Prices of certain foreign growths
and qualities in specified markets

Market location, kind and quality	Date: 1945:	Unit of weight	Unit of currency:	Price in: foreign currency:	Equivalent U.S. cents per pound
Alexandria (spot)	:	:Kantar	:	:	:
Ashmouni, F.G.F.	7-5:	99.05 lbs.	:Tallaris	30.50:	25.47
Giza 7, F.G.F.	7-5:	99.05 lbs.	:Tallaris	40.00:	33.41
Karnak, F.G.F.	7-5:	99.05 lbs.	:Tallaris	39.00:	32.57
Bombay (July '45 futures);	:	:Candy	:	:	:
Jarila a/	7-6:	784 lbs.	:Rupee	419.25:	16.11
Bombay (spot)	:	:Candy	:	:	:
Kampala, East African ...	7-6:	784 lbs.	:Rupee	850.00:	32.66
Buenos Aires (spot)	:	:Metric ton	:	:	:
Type B	- :	2204.6 lbs.	:Peso	- :	-
Lima (spot)	:	:Sp. Quintal	:	:	:
Tanguis, Type 5	7-7:	101.4 lbs.	:Sol	103.00:	15.63
Recife (spot)	:	:Arroba	:	:	:
Mata, Type 5	7-6:	33.07 lbs.	:Cruzeiro	80.00:	13.17
Sertao, Type 5	7-6:	33.07 lbs.	:Cruzeiro	85.00:	13.99
Sao Paulo (spot)	:	:Arroba	:	:	:
Sao Paulo, Type 5	7-6:	33.07 lbs.	:Cruzeiro	89.00:	14.73
Torreón (spot)	:	:Sp. Quintal	:	:	:
Middling, 15/16"	7-7:	101.4 lbs.	:Peso	88.75:	18.01

Compiled from weekly cables from representatives abroad.

a/ Quotation for June 29, 1945 was 420.5 rupees or 16.16 cents (U.S.).